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ABSTRACT

The Consumer Education Department, which has existed within the J.C. Penney Company for over fifty years, supports its stores in local communities by providing a service to educators. This service consists of both the development of original educational materials and the delivery of inservice programs to local educators. To continue to respond to changes occurring in education, the department has initiated a planned change process that uses an open systems planning model responsive to interaction by consumer education with a wide and diverse environment. This change model provides for a diagnostic process of planning involving seven steps: (1) defining the organization's core mission, (2) mapping the demand system, (3) identifying the current response, (4) projecting the demand, (5) identifying the desired state (results five years later), (6) activity planning, and (7) affirming the plans. Needs, concerns, resources, and approaches identified by educators in the activity planning process are currently being scrutinized in the affirming stage. These three major areas emerged as vital components and were explored and legitimized through Think Tanks: futures, learning theory, and lifespan consumer education. (A Think Tank Simulation Guide is appended.) (YLB)

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"EDUCATION IN THE CORPORATION: A PROCESS FOR MANAGING CHANGE"

by

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

This presentation will:

1) Describe the involvement one corporation plans to have in education during the next 10 years.

2) Outline the change model used by the corporate department in creating a new education delivery system.

3) Involve the audience in a "think tank" simulation to illustrate one of the change methods used by the department.

ABSTRACT

The Consumer Education Department has existed within the J. C. Penney Company in one form or another for over fifty years. Its role is to support its stores in local communities by providing a service to educators. This service consists of both the development of original educational materials and the delivery of in-service programs to local educators. In order to respond to the changing needs of educators, the program must be flexible and change as the needs of educators change. The program has consistently demonstrated, through award-winning resources and outstanding educational field endeavors, a leadership role in Consumer Education.

To maintain this role, it became apparent that with the changes occuring in education, new responses were called for. A planned change process was initiated which used an open systems planning model. Interaction with a wide and diverse environment by consumer education required the use of such a planning model. The seven steps followed in this process included: defining the core mission; mapping the demand system; identifying the current response; projecting the demand; identifying the desired state; activity planning; and affirming the plan. Is is this affirming stage which is currently in process. Although the temptation has been to rush through this stage to get to the "action" stage, the eight months spent in planning has given staff confidence that the direction evolving is appropriate. Some of the unique processes, theories and structures used, such as a matrix structure, use of think tanks; networking and life span theories have affirmed our earlier recognition of the importance of careful planning in the change process.

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EDUCATION IN THE CORPORATION

Basis for JCPenney's Involvement in Consumer Affairs

The J. C. Penney Company has a history of high regard for its community responsibility, both because of the business aspect - healthy communities benefit business - and from a moral obligation. In 1930 the company's founder included in a training manual the role of store managers in community service. The balanced role of community service is reflected in his statements, "It would be unwise for us to lend a hand in community betterment merely to improve our own business. The only true community spirit is that which sets up a general improvement and betterment plan for the benefit of all." One evidence of this plan which allows the company to give something back to the community is the Consumer Affairs Department.

Role of Consumer Affairs

This company is one of only a handful of American companies with a Vice President of Consumer Affairs. The Vice President, Satenig St. Marie, sees the essential thrust of a Consumer Affairs Department as representing the consumer perspective inside the business. The four departments in Consumer Affairs which serve to carry out this program are: Consumer Information, which develops and provides materials to help the consumer make more intelligent buying decisions; Consumer Research, which seeks to gain insight into non-articulated consumer concerns as well as changing consumer attitudes and values; Consumer Advocacy, which represents the consumer activist perspective within the company; and Consumer Education, which has been active in community-based consumer education for more that fifty years.

Role of Consumer Education

It is the Consumer Education Department on which this presentation is focused. Primarily, our role is to support the 1,700 J. C. Penney stores in providing a service to educators in their communities. We do this by taking the materials and resources developed by the publications staff of the Consumer Education Department to educators in the field. The materials are non-commerical, objective and are provided free of charge to educators in communities by local store managers. It is in this way that the store manager provides a real service to educators because the materials we develop must be original and not available from any

other source. Additionally, the service we provide to educators is unique in that our staff members are all educators and yet we have access to a business perspective and resources that most educators do not have. This dimension is further strengthened by the store manager through interaction with educators as they come to educational programs and to pick up their materials. This involvement serves as a continual reminder to the store manager of his role in making the community a better place to live.

As stated earlier, the Consumer Education Department has existed within the company for fifty years in one form or another. It has always responded to the needs of educators at any point in time. Evidence of this responsiveness can be seen in the varied titles by which the department has been identified. In an effort to continue to respond and to provide leadership in the field of consumer education as well, the Department is going through the change process in a planned and systematic, but somewhat unique way.

A PROCESS FOR MANAGING CHANGE

Use of Open Systems Planning[1]

There are currently many change models from which to choose when a project such as this is undertaken. Because we interact with a wide and diverse environment in our effort to provide leadership in the field of consumer education, the most appropriate action seemed to call for the use of an open systems planning model (Beckhard, Harris, 1977). This model allowed us to go through a diagnostic process of planning which is outlined as follows:

Step I - Defining the Organization's Core Mission. It is imperative that the organization's core mission be kept in focus. This is not easy. When the needs of varied audiences are being met, this mission sometimes seems to vacilate or be in conflict. However, there can be only one core mission or reason for being - all goals and objectives stem from this core. Consumer Education's mission is to develop and deliver responsible consumer materials and programs to educators and learners in the communities in which the J. C. Penney Company does business. Performance of this mission should mutually benefit both consumer and corporation as they interact and learn to appreciate the unique contribution of each other.

Step II - Mapping the Demand System or "Who is demanding what?" Educators, store managers, field representatives and advisory committees were indicating that change was needed. Changing values of teachers (an entitlement mentality), as well as lowered school enrollments and tightened school resources (including cost of fuel for travel) were factors inhibiting the professional development activities of teachers. Consumer Education's program effectiveness was, to some extent, reflected in the number being served and this number was declining.

Step III - Current Response. The development and delivery of consumer education materials and programs by this department was addressed earlier. To illustrate the focus of these materials, we are distributing an example of one of our recent editions of Forum magazine, a semi-annual publication. The Fact Sheet inside the Forum identifies the other types of resource units produced. Local store managers purchase these from the New York office, loan the resource units, and provide at no charge, single issues of the Forum publication to educators in their communities. In the past, field representatives traveled throughout the country to assist educators via educational programs with effective ways to use the materials.

Step IV - Projected Demand System or "What happens if we go with the status quo?" We have been recognized as playing a leadership role in consumer education and our multi-award winning materials are held in high regard by educators. However, it was becoming increasingly important to respond to changes within the larger educational environment in order to maintain that leadership role. In addition to the trends identified in Step II, evidence we accumulated reflected the following negatives:

(1) limitations of our chosen media.

(2) limitations of identifying primarily with one discipline; consumer education is interdisciplinary.

(3) limitations of accessibility to materials by all who wanted to use our programs.

(4) misinterpretation; we were being categorized with vendors of materials designed for sale - or profit making.

Step V - Desired State or "Where do we want to be in 5 years?" It is desired that the corporation recognize fully the importance of the consumer perspective in an age of diminishing resources and lack of confidence in business. It is also desired that we will foster in the consumer a legitimate confidence in business by enabling them to exercise their rights and responsibilities in the marketplace.

Step VI - Activity Planning or "What to do to achieve this?" Because of the complexity of the problem, it was determined that a matrix structure made up of the division head and the total consumer education staff (publications and field) plan and carry out the change process. Use of a matrix structure increases the chances of success in the change process but additional time for communication and adjustment are required to reduce conflict and enable those involved to resolve loyalty issues.[2]

GATHERING DATA - USE OF THINK TANKS

The manager of the field program sought out educators in key positions and systems to identify needs, concerns, resources and approaches for beginning the activity planning process. The spiral

process of the system approach was utilized at each step of this activity planning. As the matrix began to focus on the directions relevant to its mission, three major areas emerged as vital components to the plan. Exploring these areas could unearth the "missing links" and legitimize the parts of the plan already in place. It was decided that Think Tanks would provide the best format for allowing this exploration and legitimizing to occur. A consultant was brought in to train the matrix in facilitating the Think Tanks. The three Think Tanks which were held:

(1) Futures - This Think Tank involved a number of Futurists from around the country. It focused on future trends in social, technological and physical arenas, and examined values implicit in these trends.

(2) Learning Theory - A second Think Tank was held to examine education, especially as it related to future trends and the learning theories inherent in education appropriate for the 80's.

(3) Lifespan Consumer Education - The third Think Tank was yet more focused and the framework was a lifespan approach. It examined consumer education focusing on the needs of consumers at different life cycle stages. Futurist predictions as they related to consumer education were considered. Additionally, appropriate delivery systems and networking theory were included as part of the planning process.

After each Think Tank the matrix spent extensive debriefing time, synthesizing the Think Tank information and formulating a plan for change.

(A simulated Think Tank activity will be experienced here by conference participants).

Step VII - Affirming Plans. We are currently in the affirming stage of the planning process. This includes meeting with people from systems with whom we wish to network, asking for their ideas about the plan, and making appropriate adjustments.

The temptation with any process of this type is to rush through the planning process to get to the "action" stage. We have been approximately eight months in the planning process and we acknowledge the frustrations and the temptation to "get on with it." We are confident about where we are and feel that our patience will be rewarded because of our sound, forward-looking plan - a plan that could result only from a well-designed process for change.

FOOTNOTES

[1]Although the change process described here focuses more on change in a total systems context, Satenig St. Marie identified some general guidelines which have assisted staff as change agents in bringing the consumer perspective into the decision-making process of the corporation:

- Decisions and changes are rarely ever accomplished through orders issued from the top. Instead, the process of day to day decision-making is based on influencing. Progress will occur not as the result of directives but from the ability to work with all levels of management in a persuasive, yet tactful manner.
- Meet management where they are - try to understand the world from their perspective and their needs.
- Work toward incremental improvements - not an overnight utopia.
- Recommend and implement a set of combined, interrelated solutions - attacking on only one front seldom wins battles.
- Exercise a high degree of patience and fortitude.

[2]For strategies to reduce the resistance to change inherent in any change process see:
John Kotter and Leonard Schlesinger, "Choosing Strategies For Change," Harvard Business Review, 57, No. 3 (1979), 106-113.

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AUTHOR'S CREDENTIALS

Jacqueline Addington completed post-graduate work at Michigan State University earning a Ph.D. in Family Ecology, College of Human Ecology. Undergraduate work was completed at University of Houston, Houston, Texas. Professional experience includes: management associate for large corporation; teacher educator; family life educator and co-author of a federally funded research project to combat teen pregnancy; various national consultant roles, and classroom teacher. Currently she is teaching at the University of Houston.

Ardis Armstrong Young is enrolled in the Executive MBA program at Pace University, New York, NY, having completed Bachelor of Science and Master of Science degrees in Home Economics at Montana State University. She has also done graduate work in education administration at Washington State University. Professional experience includes: chair of a university department; state supervisor of vocational home economics programs; retail entrepreneur and education/management consultant. She is presently Manager of Consumer Education, J. C. Penney Company, New York City.

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J. C. Penney Company, Inc.

THINK TANK SIMULATION GUIDE

CHANGES	VALUES	INNOVATION
1. The 1980's promises many social changes with far-reaching implications for educators. As a group, forecast the one change you feel will have most impact on the field of education.	2. Identify the value changes that will occur both personally and as a nation to accommodate this major social change.	3. Describe the innovations needed in education programs to make this a positive change. Content Delivery Facilitators